Staff Tutorials

Advanced Evergreen Reporting

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Navigating to the Reporting Interface

Step by Step: Reaching the reporting interface.

1) Open a new tab or highlight a tab to use.
2) Select the "Admin(-)" menu from the right-hand side of the menu bar and click on the "Local Administration" option.
3) Follow the "Reports" link, which will bring up the reporting interface.

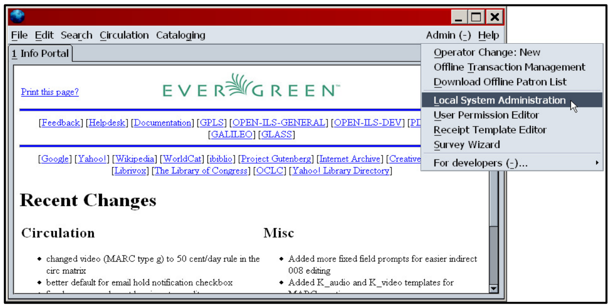


Figure 1: Navigating to the Reporting Interface

Viewing/Managing Folders: Folder Navigation

The reporting interface displays the user's component folders and the shared component folder. The icon indicates that this folder has subfolders that can be accessed by the user; the icon indicates that this folder has no subfolders that are viewable by the current user. However, these folders may contain reporting components.

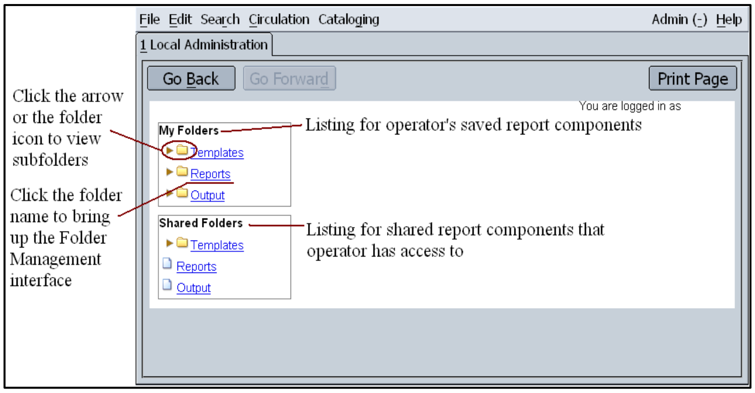


Figure 2: Navigating Report Folders

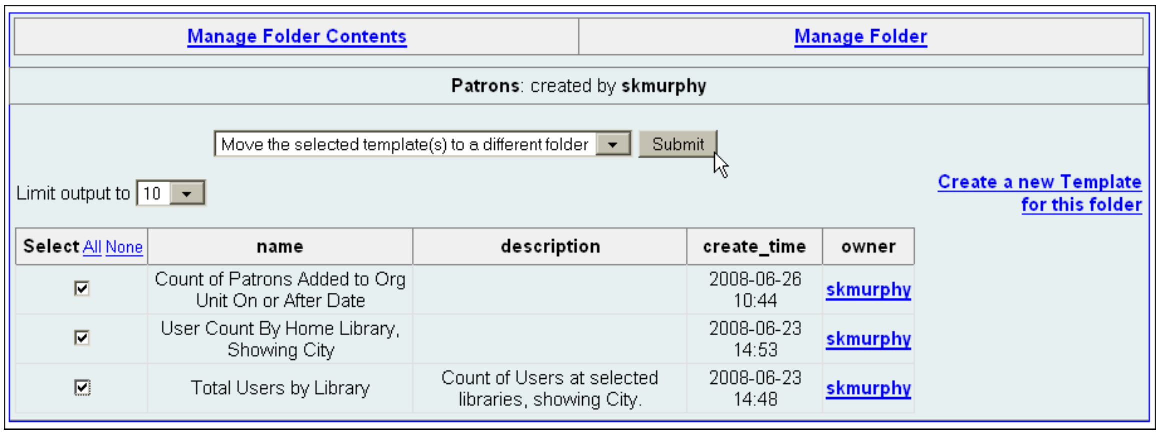
Clicking the or the icon will expand a folder to allow the user to view all existing subfolders.

Clicking on the folder name for one of the three component subfolders under “My Folders” will bring up the interface for adding new subfolders.

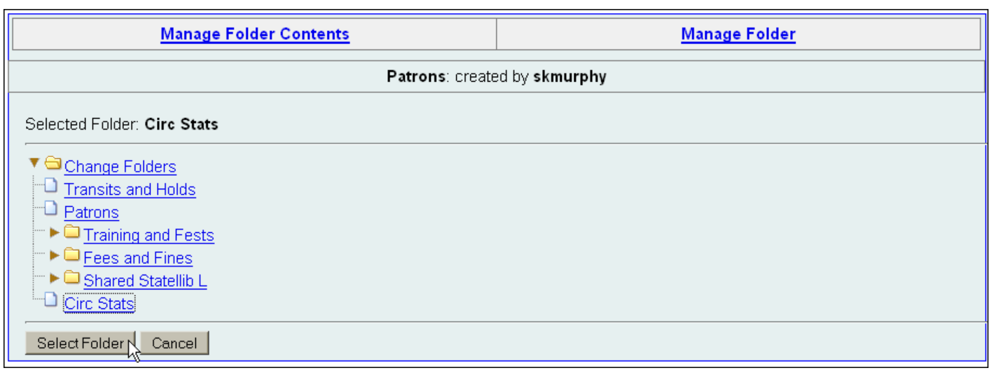
Viewing/Managing Folders: Folder Management

Subfolders contain a folder management interface. Clicking on the name displays the subfolder contents as well as offering a management interface at the top of the display. The “Manage Folder” option allows for creation, deletion, sharing, hiding and changing the current subfolder while the “Manage Folder Contents” option gives the user options for managing the templates, reports and output in contained in the subfolder.

Components may be moved from one folder to another, as well. To do this, check the box next to the component to be moved. Then, select “Move selected template/report/output(s) to a different folder” from the dropdown menu.



Then, select the destination folder and click “Select Folder” to move the components.



Basic Reporting: Using Pre-Made Templates

This section covers use of templates to create and run reports. This requires that the templates have already been created and made available – either in the shared folders or your local folder.

Report Creation Interface

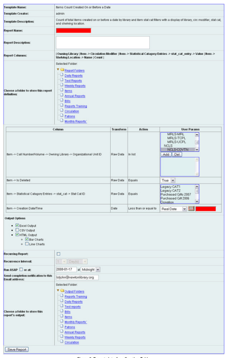


Figure 3: Reports Interface Creation Table

The Report Creation Interface allows the user to create a specific report from a chosen template. The left-hand side of the screen contains the navigation panel and the right-hand side of the screen contains a table of fields

> Important Note: Navigating away from a report mid-creation will cause changes to be lost; at this point, the template must be selected and another report created.

Some of the fields require a user action (such as selecting a report name and selecting the location where the report should be saved); others have optional user actions (such as creating a report description or designating a schedule for recurring reports), and others do not have any associated actions, but display data about the template.

Sections of the Report Creation Interface

- **Template Name (*informational)***

Template Name:	Circulation by Hour

This displays the name that was given to the template at the time it was created.

- **Template Creator (*informational)***

Template Creator:	admin

This field contains the username of the template's creator.

- **Template Description (*informational)***

Template Description:	Circulation by hour with a filter of library and date range.

This field contains the description given to the template by the template's creator.

- **Report Name *(action required*)**

Report Name:	

This row has a text field in which the name of the specific report must be entered. This name will be viewable by the creator and anyone with whom the report is shared – it should be short and concise, but give some information about the report.

The report *cannot* be saved or run without a name in this field. The report must also have a unique name from any other report in the user's folders.

- **Report Description *(action optional)***

Report Description:	

This row contains a text box in which a more detailed description of this specific report can be entered. The description will be viewable by the report's creator and anyone with whom the report is shared. This field should contain useful information about the report query, such as the date of creation, whether or not the report is recurring, type of data the report returns, etc. Specifically chosen report parameters are not recorded by the reports interface so this is a good place to record these for later reference.

- **Report Columns (*informational)***

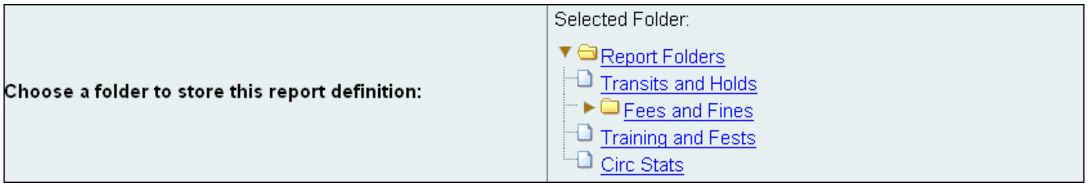
Report Columns:	Library Short (Policy) Name Circulation -> Check Out Date/Time Count

This field contains a listing of the columns that will be output in the end results. Each column is listed as a path from the base database object that is queried, and separated from the next column by the '|' (pipe) character.

For example, if a report contains a column showing the short name of the owning library of a circulating item, this column would be listed as:

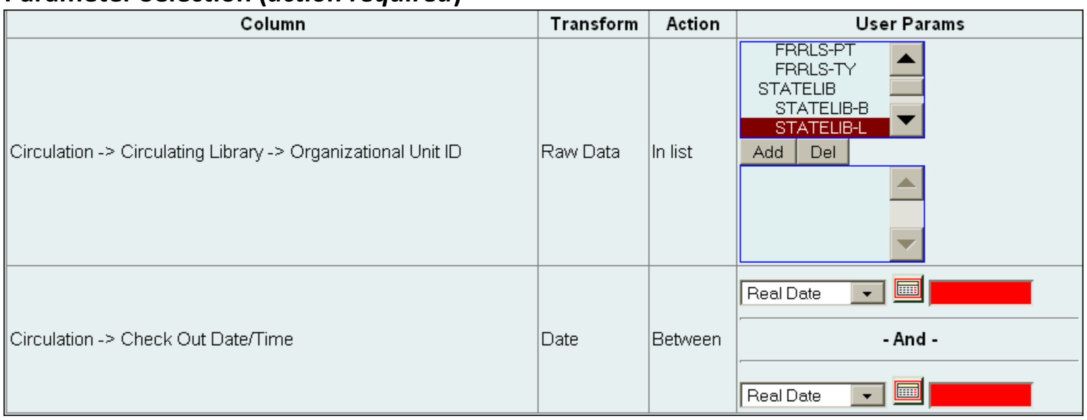
"Circulation -> Circulating Item -> Call Number/Volume -> Owning Library -> Short (Policy) Name," with a '|' delineating the end of this path before the next column that will be included in the report.

- **Choose a folder to store this report definition (*action required*)**



The Report subfolder in which to store this report definition must be specified here. This section displays the user's "Reports" folders and allows for navigation to specific subfolders. Clicking on a specific subfolder will cause it to appear in bold at the top of the field as the chosen folder.

- **Parameter Selection (*action required*)**



This section is unlabeled, unlike the other fields in the Report Creation Interface.

Four columns are displayed in the Parameter Selection area of the table: Column, Transform, Action, and User Params. The first three are purely informational and cannot be altered in the Report Creation Interface; they were setup and specified at the time of the template's creation:

1. *Column* displays the field name, such as Owning Lib, Circ Date, etc.
2. *Transform* describes how the data will be formatted in the report; for example, a date could appear as day + month, date, or time+date /date, etc. [see the lkjags section for more details on transforms].
3. *Action* describes the type of filter that will be applied, such as "In List", "Equals", "Does Not Equal", etc…
4. *User Params* displays the filtering options that the user must choose and apply to this report. This is where the filters that were generically defined in the template are specifically applied for the report.

   For example, if the template specifies that information is filtered by Circulating Library, this section is where the user chooses the specific Circulating lib(s) that should be included in this report. If the template was created with the "In List" action for this field, a list widget is displayed showing all organizational units. The user must select at least one organization unit and may select more.

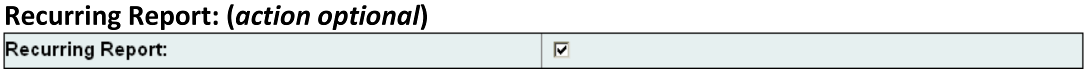
- **Output Options: (*action optional*)**

This section determines how the results of the report will be delivered. By default, Excel Output, HTML Output and bar graphs are chosen. However, CSV (comma delimited) and HTML line graphs are also available; the user specifies output choices by checking the boxes beside the desired output formats.

HTML format will create an HTML page with a table containing the data. If bar and/or line graphs are chosen, those graphs will be included on the HTML page rather than the table.

> WARNING: If you expect your results to exceed the Excel's line limit of 167,000+ lines and you must choose CSV format to obtain a complete set of results. A shelf-list of part of your collection could easily surpass the limit.

- **Recurring Report: (*action optional*)**

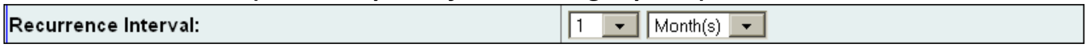


By default, reports are non-recurring (i.e., will only be run once). However, many reports are used on a daily, weekly, or monthly basis. Checking the "Recurring Report" box allows the user to specify a frequency for the report to run automatically.

If a report is to be recurring, it is *very* important that all dates specified in the User Params section be relative dates, as opposed to real dates.

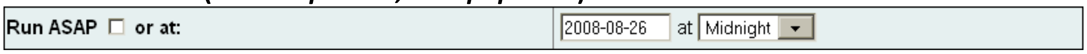
If the filter dates are real, then each time the report is run in the future, it will return information for the specified real date, instead of the information that is relevant to a daily/weekly/monthly/ report.

- **Recurrence Interval (*action required for recurring reports*)**



The checkbox in the Recurring Report section above must be checked to active this field. Use the dropdown lists to designate the desired interval for the report to run automatically. Days, Weeks and Months from 1 to 24 are available choices; to run the report once per day, select “1” and “Day(s)”; to the run the report once every 3 months, select “3” and “Month(s)”

- **Run ASAP or at: (*action optional; autopopulate*)**



By default this text box is automatically populated with the current date and time of midnight. If no other result is desired, then no action is necessary.

However, if one wants to have the report run as soon as possible, the “Run ASAP” checkbox must be selected.

One may also wish to set up the report to run at a specific in the future. In this case, the “Run ASAP” box should be left uncheck and the user should enter the date and select an approximate time from the drop-down box.

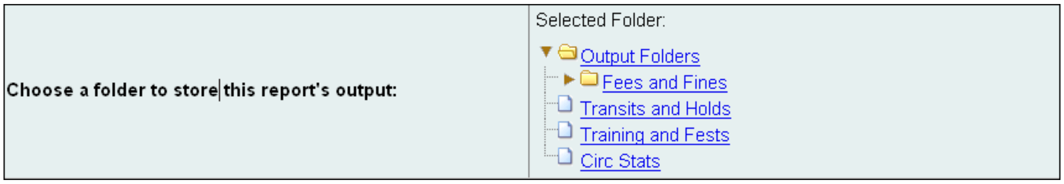
Specifying an exact date and/or time would be useful when setting up recurring reports; i.e., a report is set up on Tuesday to reoccur once a week on Friday therefore it should then be set to run on Friday’s date to recur every 1 week.

Please note that the time is a dropdown offering on the hour time selections only; the report servers can only run a finite number of reports concurrently. The report will go into the queue at the hour specified (or immediately if “Run ASAP” is selected), but may not run immediately if there are other reports before it in the queue.

- **Send completion notification to this Email Address: (*action optional; autopopulate*)**

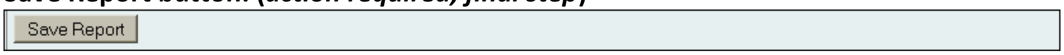
By default this is populated with the user’s email address. Reports may be sent to any email address by inserting the correct information in this text box. If the report results will be sent to multiple users, input the each email address separated by a comma. Please be aware that to obtain email reports results the recipient must be able to login in to Evergreen and have the appropriate permissions.

- **Choose a folder to store this report’s output: *(action required)***



The Report subfolder in which to store this report's output must be specified here. This section displays the users' component "Output" folder and allows for navigation to specific subfolders. Clicking on the name of a specific subfolder will cause it to appear in bold at the top of the field as the chosen folder.

- **Save Report button: (*action required, final step*)**

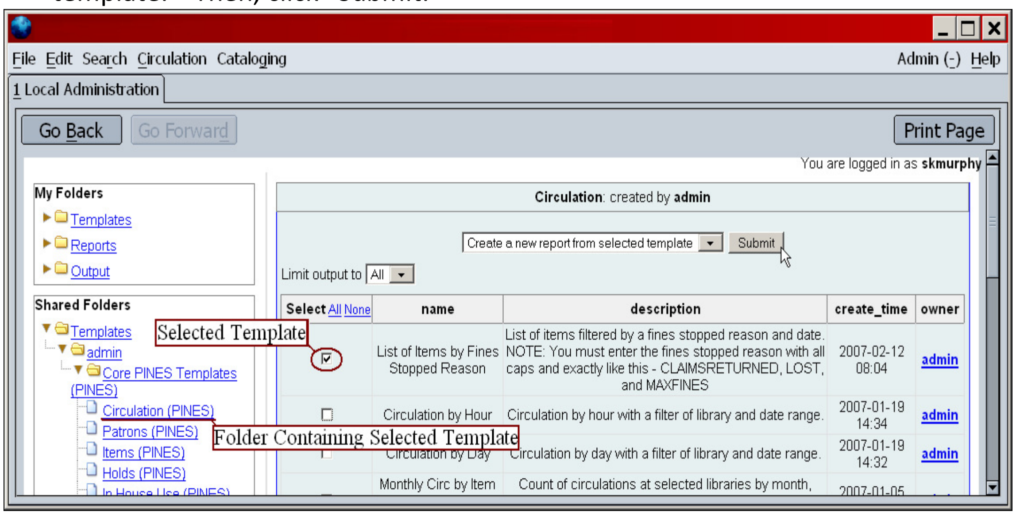


This is the final step in creating a report. Clicking this button will save this report definition and cause the report to run. The response to the action will be "Action Succeeded". If any required action was not taken, then the user will receive and error message indicating which action was not performed. For example if a folder for output was not chosen the error message will be "Choose a Folder". The user must perform the requested action, then click Save Report again.

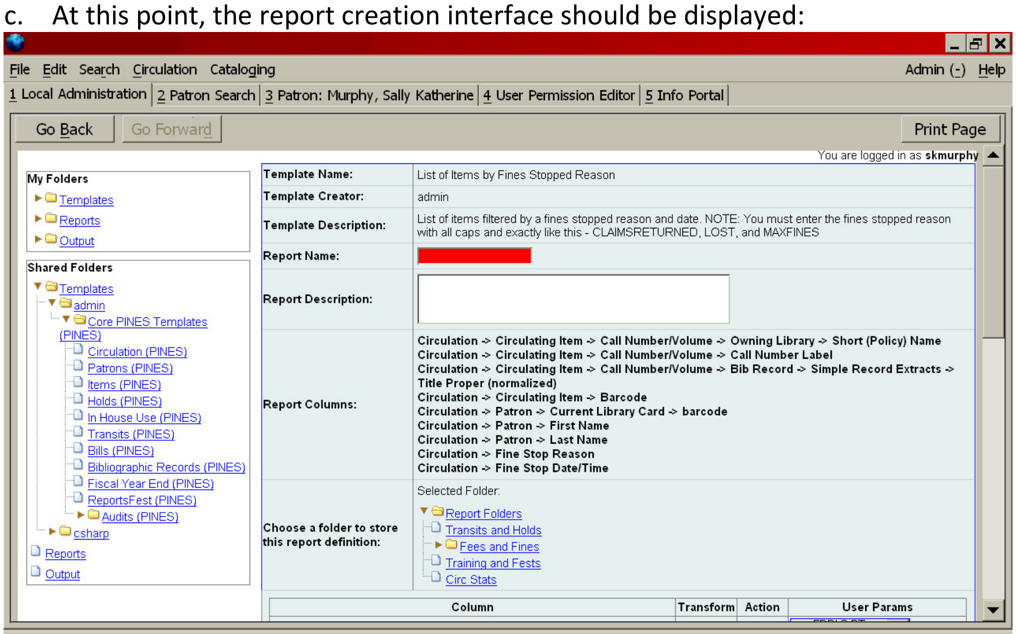
How To Create a Report From a Template.

This section explains the steps for creating a report from an existing template.

1) **Navigate to template folder.** Navigate to the folder containing the desired template within the Reporting Interface. (See "Navigating to the Reporting Interface" and "Folder Navigation"). If you're using a template you've cloned or created, this will be under My Folders. If you are creating a report from a shared template, this will be located in the Shared Folders.
2) **Select and open desired template.**
   a. Check the box next to the template you wish to use to create the report.
   b. From the drop down box at the top of the display, choose "Create a new report from selected template." Then, click "Submit."



   c. At this point, the report creation interface should be displayed:



Navigating away from a report mid-creation will cause all changes to be lost; then the template must be selected again and the report restarted.

3) **Create the report in the Report Creation Interface.**
   a. Name the report. Try to give the report a descriptive name; you may wish to include date or purpose for the report.
   b. Provide your description of the report. This is optional, but it is strongly recommended that the selected parameters or other descriptive information be added here.
   c. Click on a Report subfolder where you will store your report; the folder will appear in bold at the top of the folder tree.
   d. Choose your parameters.
      i. For Date parameters, you can enter the date by the YYYY-MM-DD format or use the Calendar widget to enter a date.
      ii. For “In List” parameters, you can select one or more choices from a list. This is generally used for Organizational Units, such as library branches or regional systems. Once the correct lines are highlighted, use the “Add” button to select them.

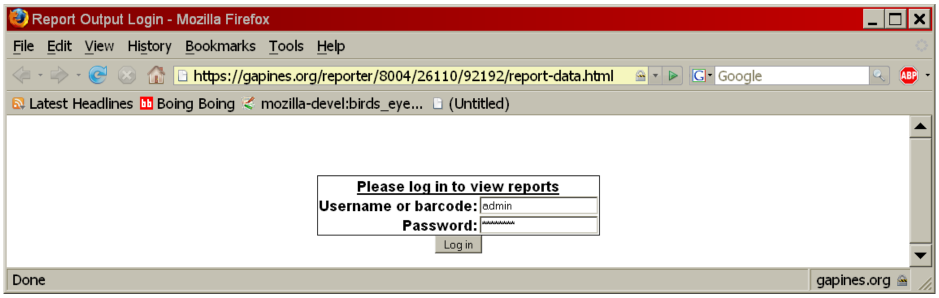
To choose more than one selection: if the choices are next to each other use Shift + Click and the ADD; if the choices are not next to each other use CTRL + Click to select and then ADD; OR, you can select each, click ADD and go back to the list and select another and click add until you are done.

      iii. For “In List” parameters that do not offer a list of selections, enter each string that needs to be compared, using the “Add” button to add each to the parameter list. If the “Upper Case” or “Lower Case” transforms are not shown in the “Transform” column, then these fields are case-sensitive.
   e. Select output format by checking the boxes for the desired formats.
   f. If the report is to run on a recurring basis, then check the “Recurring Report” checkbox and select the recurrence interval.
   g. If the report must be run immediately, check the “Run ASAP” box. Otherwise, enter a time and date for the report to run. By default, reports will run at midnight, but any hour of the day can be selected.
   h. Enter any additional email addresses that the completion notification should be sent to (usually the default is all that is necessary for this field).
   i. Now choose an output folder for the report results which appears at the top of the folder tree in bold.
   j. Finally, review all your choices. When satisfied, click on SAVE.
   k. An “Action Succeeded’ message is returned, then congratulations! The report has been created, and scheduled.

4) View Output Via Email

a. Once the report has finished running and the output files are complete, an email will automatically be sent to every address specified in the Report Creation Interface. This email contains a hyperlink to the output, which is available from a web browser such as Firefox, Safari, or Internet Explorer.

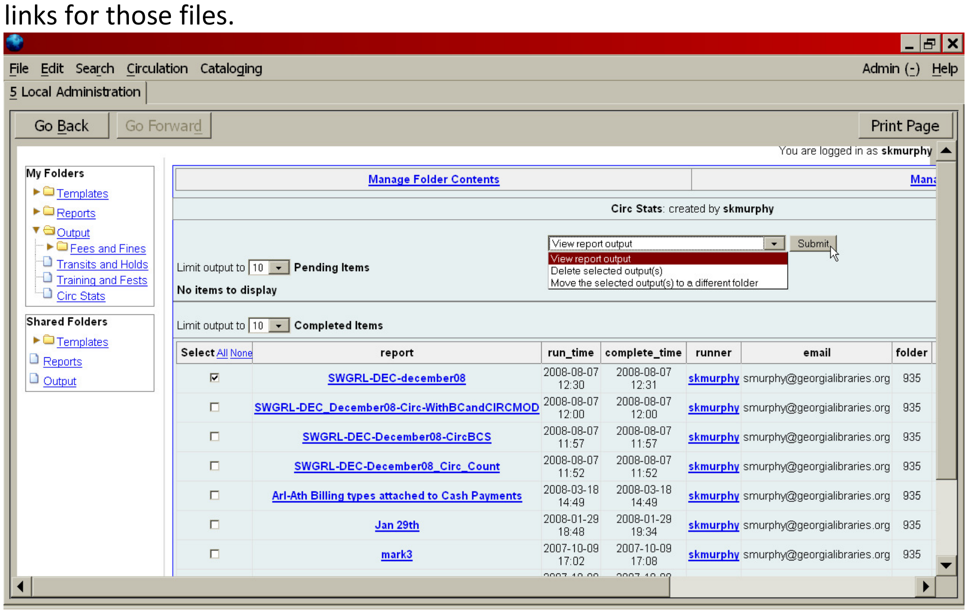
b. Click on the hyperlink or copy it and enter it into a web browser in order to bring up the webpage containing the output. The page will ask for a valid Evergreen login before allowing the report output to be viewed.



c. Enter a valid staff login and password and press “Log in”; this will bring up the output page. If HTML outputs and/or bar or line graphs were selected, they will be visible here. If Excel and/or CSV formats were selected, the output page will include links to those files for download.

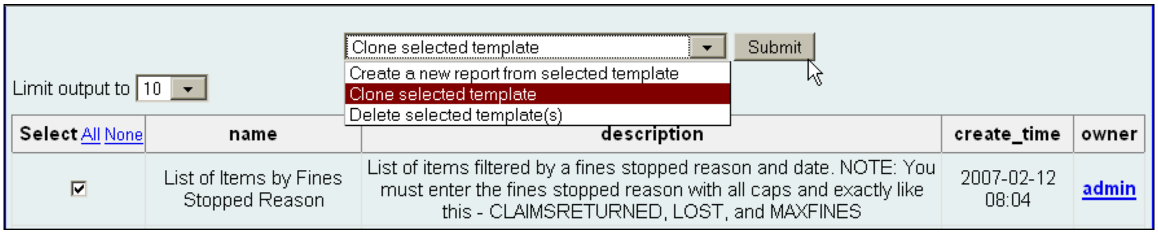
5) View Output Via Staff Client

a. Navigate to the Output folder that was specified during the report’s creation. This will display a listing of all outputs that have been stored in this folder.
b. Check the box next to the output to be viewed.
c. Select “View Report Output” from the dropdown menu and click “Submit” to bring up the output page within the Staff Client. If CSV or Excel formats were selected then this page will also contain download links for those files.



Basic Reporting: Viewing and Copying Existing Templates

To view a Template, select the template as you would for report creation. However, before clicking the "Submit" button, choose "Clone template" from the dropdown menu.



However, before showing the copy, the Staff Client will ask you to select a folder. If you're merely viewing the template, then select any folder; however, if you're copying the template, select the folder that you wish to copy into.

Clicking "Select Folder" will bring up an exact copy of the template in the Template Creation Interface for viewing and editing.

To copy the template, edit the name as desired and select "Save"; to exit without copying, close the tab or select "Go Back".

Sometimes, a pre-created template provides data that may lack certain display fields or may require further filtering. To make adjustments to a template, clone the template as described above; from this interface, the template may be adjusted and the modified template may be saved to local or shared folders. See the Advanced Reporting Guide for more information.